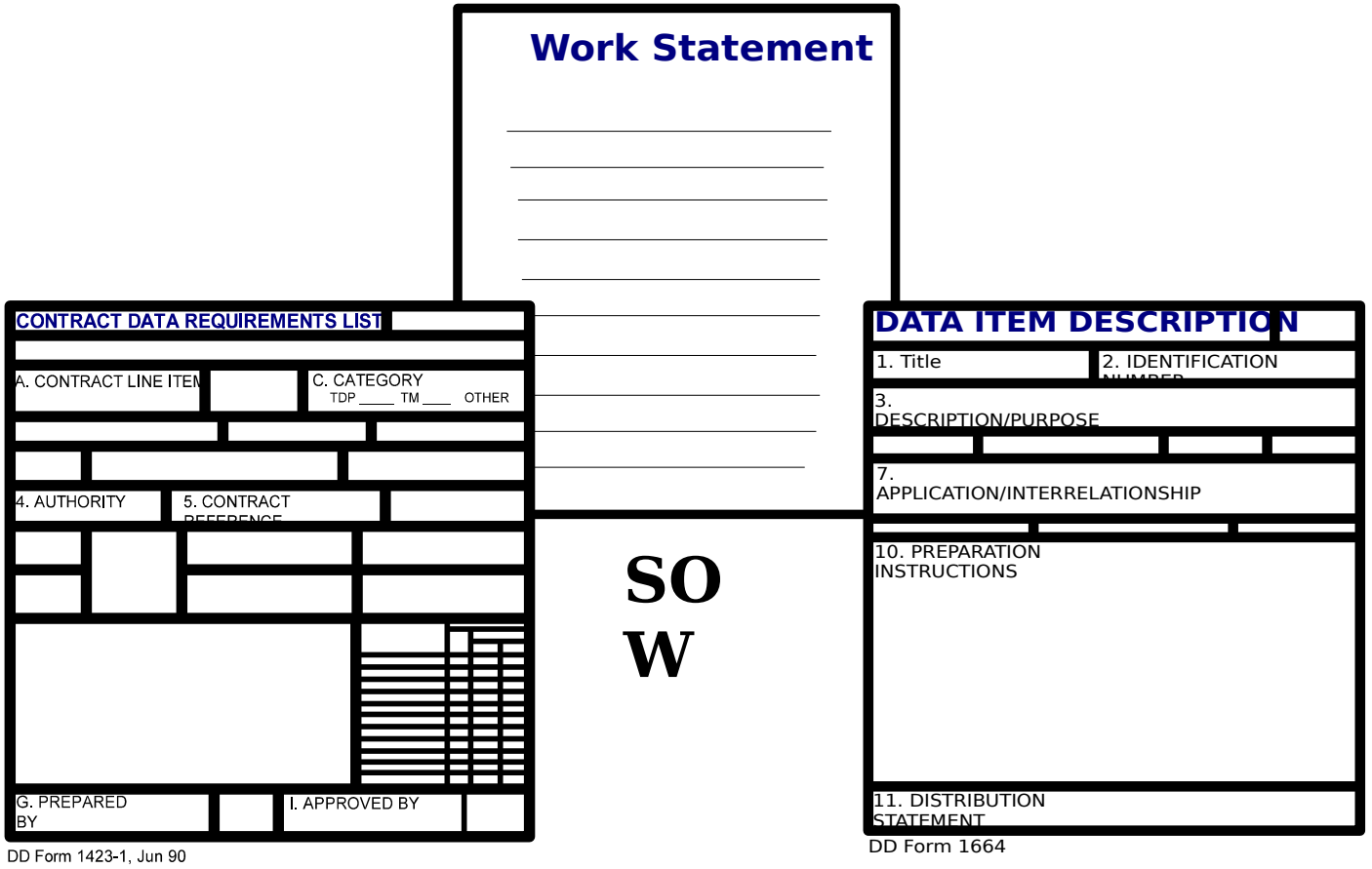
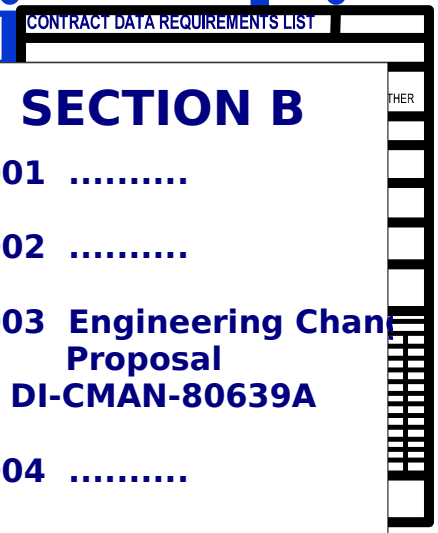
SOW & CONTRACT DATA



SPEC - SOW- CDRL - DID Relati



WORK STATEMENT

3.5 .. "the contractor shall maintain configuration control IAW ..."

SPECIFICATION

DATA ITEM DESCRIPTION

Engineering Change Proposal DI-CMAN-80639A

RELATIONSHIPS

SOW-CDRL (MIL-HDBK-245D)

3.2 The SOW defines (either directly or by reference to other documents) all work (non-specification) performance requirements for contractor effort. Qualitative and quantitative design and performance requirements are contained in specifications developed in accordance to MIL-STD-961. Such specifications are typically referenced in the SOW, but the specific qualitative or quantitative technical requirements shall not be spelled

RELATIONSHIPS

CDRL - DID (MIL-HDBK-245D)

3.7.1 The ordering and delivery of data which the Government requires are specified and scheduled through the use of the Contract Data Requirements List (CDRL), DD Form 1423, in conjunction with the appropriate Data Item Description (DID), DD Form 1664. The CDRL is used to order the data required and tailor the DID. The DID use is to describe the data's format and content requirements. The SOWtask(s) that will produce data requirements shall be referenced in Block 5 of the CDRL. The SOW author should exercise considerable care and attention to the data delivery implications of the SOW. While data may be inherently generated by a work task, recording and delivering the data in a specific format are cost drivers that must be considered when preparing the SOWand CDRLs. The

RELATIONSHIP

SOW-SCDRL - DID (MIL-HDBK-245D)

3.7.2 After the need for recording and delivery of data resulting from a work task has been determined, appropriate DIDs should be selected from DoD 5010.12, Vol II, Acquisition Management Systems and Data Requirements Control List (AMSDL). If certain elements of data are not needed, the DID shall be tailored downward noting deletions in CDRL Block 16. When the contractor format for data products will meet the Government's needs, it should be specified in Block 16 of the CDRL if the DID does not already state contractor format is acceptable. The CDRL should only require data specifically generated in a SOW work task. The SOW, and not the DID, must

MIL-HDBK-245B

4.3.1 When properly written, the SOW establishes nonspecification tasks and identifies the work efforts to be performed expressed as minimal needs.

As the contractor performs the effort and completes the tasks, information that may be required for retention will inherently be developed with the work performed.

Text of the SOW tasks shall not include the description and delivery requirements for data.

The ordering and delivery of data can be legally defined and scheduled only through the use of the CDRL, DD Form 1423, in conjunction with the incorporation of the appropriate data Item Description (DID), DD From 1664, for equipment and systems under advanced development, full scale development, and production.

It becomes obvious then, that the role of the SOW is to define those work tasks which cannot be contained in a specification and must never be included in the CDRL or DID. The

TO GET DATA - MUST HAVE ALL THREE

STATEMENT OF WORK:

Causes contractor effort or work that develops information.

CDRL (DD 1423):

Used only to list and order the contract data required.

DID (DD 1664):

Used only to describe the data and prescribe the preparation instructions in terms of format and arrangement.

MIL-HDBK-245D : Para 3.6.4b SOW DON'Ts:

- **Order, describe, or discuss Contract Data Requirements List (CDRL) data**
- **Invoke, cite, or discuss a Data Item Description (DID). Although the text of the work statement shall not include the data format and content preparation instructions and/or data delivery requirements, a data item description listed on the CDRL may be cross-referenced in the SOW.**
- **Specify technical proposal criteria or evaluation factors.**
- **Establish a delivery schedule. (May include significant milestones for clarity.)**
- **Specify design control parameters or the performance of hardware because these items should be covered in a specification.**
- **Impose on the contractor Government format when a contractor format is acceptable.**
- **Overspecify. Specify what is required and let the contractor establish the best method to fulfill the requirement.**
- **Invoke in-house management instructions.**

Product Words (That should never be in a SOW)

Agenda
audio visual aids
books
cards
certificates
minutes
charts
decks
disc-magnetic
documentation
drafts
drawings
drums-magnetic
recommendations
equipment
records
files
findings
forms
guides
graphics
handbooks
specifications
illustrations
logs
manuals
manuscript
materials
outlines
proposals
pamphlets
plans
procedures
publications
recordings
reproducible
reports
requests
sheets

PHRASES HAVING MULTIPLE MEANINGS

These (and similar wording) should be avoided:

- **To the satisfaction of the contracting officer,**
- **As determined by the contracting officer,**
- **In accordance with instructions of the contracting officer,**
- **As directed by the contracting officer,**
- **In the opinion of the contracting officer,**
- **In the judgment of the contracting officer,**
- **Unless otherwise directed by the contracting officer,**
- **To furnish if requested by the contracting officer,**
- **All reasonable requests of the contracting officer shall be compiled with,**
- **Photographs shall be taken when and where directed by the contracting officer.**
- **In strict accordance with,**
- **In accordance with best commercial practice,**
- **In accordance with best modern standard practice,**
- **In accordance with the best engineering practice,**
- **Workmanship shall be of the highest quality,**
- **Workmanship shall be of the highest grade,**
- **Accurate workmanship,**
- **Securely mounted,**

Data Timing

Don’t discuss delivery dates or frequencies in th
The DD 1423 is used to set the timing of data de

CONTRACT DATA REQUIREMENTS LIST

Form Approved
OMB No. 0704-0188

The public reporting burden for this collection of information is estimated to average 440 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Department of Defense, Washington Headquarters Services, Directorate for Information Operations and Reports (0704-0188), 1215 Jefferson Davis Highway, Suite 1204, Arlington, VA 22202-4302. Respondents should be aware that notwithstanding any other provision of law, no person shall be subject to any penalty for failing to comply with a collection of information if it does not display a currently valid OMB control number. Please DO NOT RETURN your form to the above address. Send completed form to the Government Issuing Contracting Officer for the Contract/PR No. listed in Block E.

A. CONTRACT LINE ITEM NO.	B. EXHIBIT	C. CATEGORY: TDP _____ TM _____ OTHER _____
D. SYSTEM/ITEM	E. CONTRACT/PR NO.	F. CONTRACTOR

1. DATA ITEM NO.	2. TITLE OF DATA ITEM	3. SUBTITLE
4. AUTHORITY *(Data Acquisition Document No.)*	5. CONTRACT REFERENCE	6. REQUIRING OFFICE

7. DD 250 REQ	9. DIST STATEMENT REQUIRED	10. FREQUENCY	12. DATE OF FIRST SUBMISSION	14. DISTRIBUTION			
8. APP CODE		11. AS OF DATE	13. DATE OF SUBSEQUENT SUBMISSION	a. ADDRESSEE	b. COPIES		
					Draft	Final	
						Reg	Repro
16. REMARKS							

WORK WORDS
(That should be in a SOW)

analyze	(solve by analysis)	identify	(to show or to find)	revise	(to correct, improve)
annotate	(provide with comments)	implement	(to carry out, put into practice)	study	(careful examination or ana
attend	(be present at)	install	(place; put into position)	search	(examine to find something
audit	(officially examine)	inspect	(examine carefully or officially)	scan	(look through hastily)
build	(make by putting together)	institute	(set up; establish, begin)	solve	(find an answer)
calculate	(find out by computation)	interpret	(explain the meaning of)	test	(evaluate, examine)
consider	(think about, to decide)	integrate	(to add parts to make whole)	trace	(to copy or find by searchin
construct	(put together; build)	investigate	(search into; examine closely)	track	(observe or plot the path o
control	(direct; regulate)	judge	(decide; form an estimate of)	update	(modernize, make current)
contribute	(give along with others)	make	(cause to come into being)		
compare	(find out likeness or differences)	maintain	(to keep in an existing state)		
create	(cause to be; make)	manufacture	(fabricate from raw materials)		
determine	(resolve; settle; decide)				
differentiate	(make a distinction between)	modify	(to change, alter)		
develop	(bring into being or activity)	monitor	(to watch or observe)		
define	(make clear; settle the limits)	observe	(inspect, watch)		
design	(perform an original act)	originate	(initiate, to give rise to)		
evolve	(develop gradually, work out)	organize	(integrate, arrange in a coherent unit)		
examine	(look at closely; test quality of)				
explore	(examine for discovery)	perform	(do, carry out, accomplish)		
extract	(take out; deduce, select)	plan	(devise a scheme for doing,		
erect	(put together; set upright)	making,	arranging activities to achieve		
establish	(set up; settle; prove)	objectives)			
estimate	(approximate an opinion of)	probe	(investigate thoroughly)		
evaluate	(find or fix the value of)	produce	(give birth or rise to)		
fabricate	(build; manufacture, invent)	pursue	(seek, obtain or accomplish)		
form	(give shape to; establish)	reason	(think, influence another's		
formulate	(to put together add express)	actions)			
generate	(produce, cause to be)	record	(set down in writing or act of		

BOILERPLATE SOFTWARE SOW

- **THE CONTRACTOR SHALL PERFORM THE WORK NECESSARY TO PRODUCE ONLY THOSE DOCUMENTS REQUIRED BY THE CONTRACT DATA REQUIREMENTS LIST.**

- **THE CONTRACTOR SHALL NOT PERFORM WORK TO PREPARE ANY DOCUMENTS NOT INCLUDED IN THE CDRL, EVEN THOUGH THEY MAY BE REFERENCED IN DOD-STD-2167 OR**

SOW INPUT

OLD - The contractor shall prepare and deliver maintenance manuals for CLS. ---

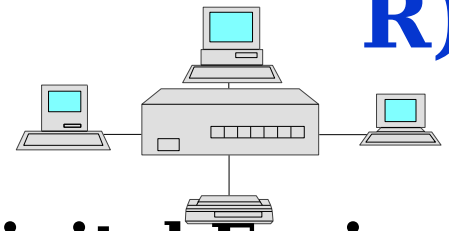
NEW – The contractor shall perform trade studies and optimize the total operation and maintenance concept and procedures for each configuration of the training system.

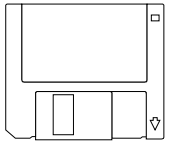
SOW INPUT

OLD - Detailed Test Procedures shall be prepared for all system and subsystems test. The procedures shall be submitted IAW the CDRL. Test Reports shall be prepared for each test. The Reports shall be submitted IAW the CDRL.

NEW - The contractor shall plan and conduct tests to demonstrate and substantiate the performance of all

Integrated Digital Environment (DOD 5000.2-R)





2.6.3 Integrated Digital Environment (IDE)

DoD policy requires the maximum use of digital operations throughout acquisition and the entire system life cycle.

- PMs shall establish a data management system and appropriate digital environment to allow every activity involved with the program to cost effectively create, store, access, manipulate, and/or exchange data digitally.

The IDE shall, at a minimum, meet the data management needs of the support strategy, system engineering process, modeling and simulation activities, T&E strategy, and periodic reporting requirements.

Contracts shall give preference to on-line access versus data exchange through a contractor information service or an existing information technology (IT) infrastructure

ARMY POLICY

Policy on Paperless Contracting - By January 1, 2000, all aspects of the contracting process will be paper free. This initiative will eliminate all internally required non-digital transactions (e.g., paper documents, forms, reports, etc.) from the contracting process (contract requirements through contract closeout)." - Apr 99

Policy on Delivery of Contract Data Items

"Where possible for each data item to be delivered under a contract, only one copy shall be specified with a single delivery point and a single destination point." - Mar 95 **If Deliver VIA E-Mail, then does not apply**

Plain English Guidelines For Streamlining A RFP

To survive, we must adopt smarter ways of doing business. Plain English is a powerful tool for doing so, because it increases internal productivity and solicitation quality. That's why I've made plain English one of my personal streamlining goals. Read this pamphlet, use plain English, and join us as we improve the acquisition process to meet the challenges of contracting in the 21st century - Jun 95

SERVICE CONTRACTS

EXAMPLES of BAD LANGUAG

The contractor's employees and any persons acting in behalf of the contractor shall comply with xxx Policy Letter 41, xxxR 690-4, and DOD 5500.7-R.

The contractor shall remove from the job site any contractor employees found under the influence of alchol, drugs, or any other incapacitating agent during their tour of duty.

The contractor shall ensure that contractor personnel are properly attired for accomplishment of their duties in accordance with xxx Policy Letter 42.

Disorderly conduct, such as use of abusive language, intimidation by words or actions, quarreling, or fighting, shall not be condoned. Contractor employees shall not participate in disruptive activities which interfere with normal and efficient Government operations.

SERVICE CONTRACTS

EXAMPLES of BAD LANGUAGE

Files shall be maintained in accordance with AR 25-400-2.

The contractor shall provide annual CPR and first aid training for his/her employees. The contractor shall be responsible for the cost of this training.

The use of alcoholic beverages or illegal drugs by Contractor personnel is forbidden while on duty. Contractor must ensure that personnel reporting for duty are not under the influence of drugs or alcohol.

Correspondence required to be executed by the Contractor in compliance with contract requirements shall be prepared as specified in AR 25-50.

COST OF DATA ITEMS

TO GET DATA - MUST HAVE ALL THREE

- **WORK STATEMENT:**

  - Causes contractor effort or work that develops information.

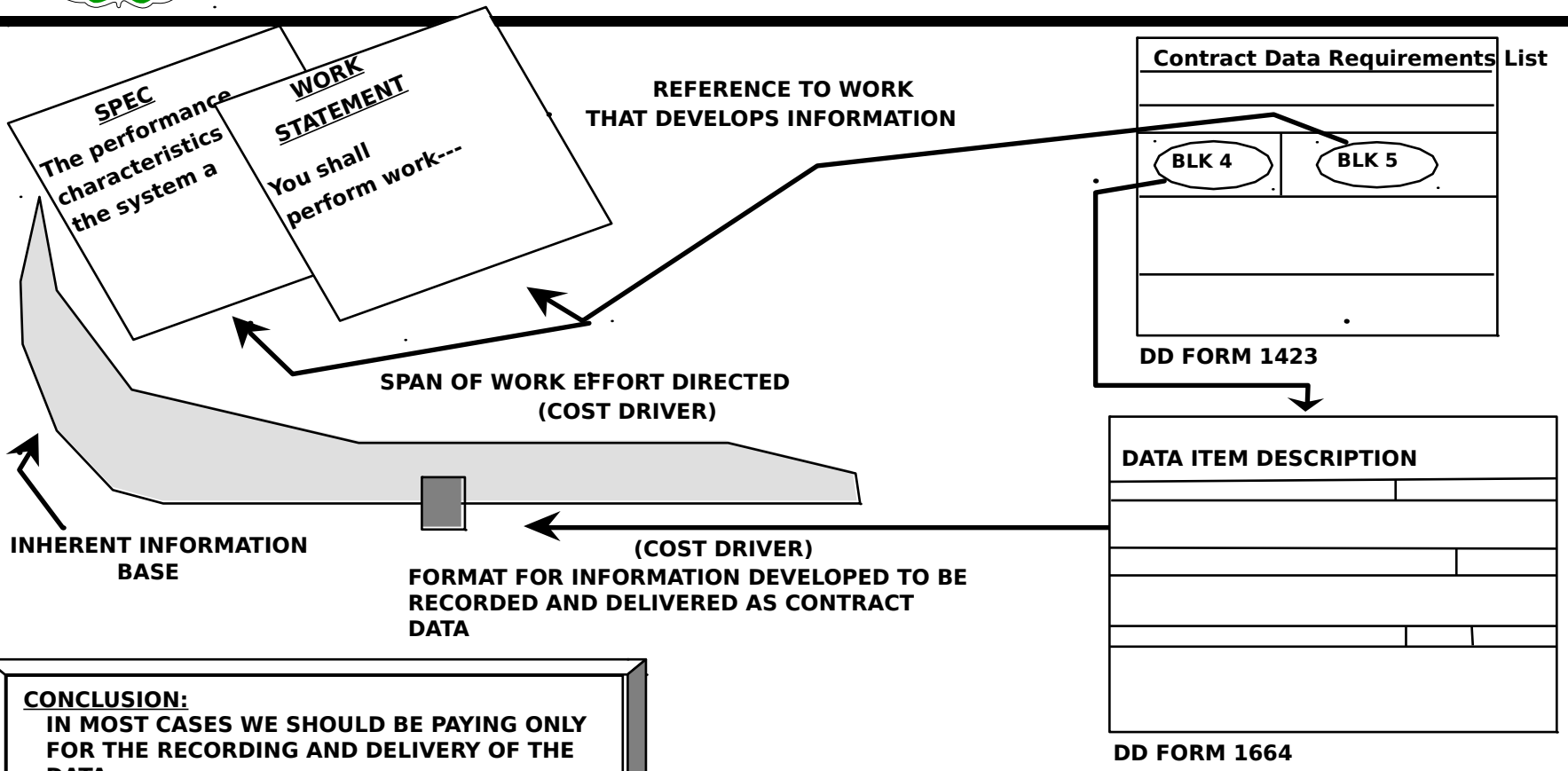
- **CDRL (DD 1423):**

  - Used only to list and order the contract data required.

- **DID (DD 1664):**

  - Used only to describe the data and prescribe the preparation instructions in terms of format and arrangement.

INTERRELATIONSHIP OF WORK EFFORT, INHERENT INFORMATION BASE AND TECHNICAL DATA ORDERED


SPEC
The performance characteristics the system a
WORK STATEMENT
You shall perform work---
REFERENCE TO WORK THAT DEVELOPS INFORMATION
Contract Data Requirements List
BLK 4
BLK 5
DD FORM 1423
SPAN OF WORK EFFORT DIRECTED (COST DRIVER)
DATA ITEM DESCRIPTION
INHERENT INFORMATION BASE
(COST DRIVER)
FORMAT FOR INFORMATION DEVELOPED TO BE RECORDED AND DELIVERED AS CONTRACT DATA
DD FORM 1664

CONCLUSION:

IN MOST CASES WE SHOULD BE PAYING ONLY FOR THE RECORDING AND DELIVERY OF THE DATA

Instructions For Completing DD FORM 1423

For the Contractor

ITEM 17. Specify appropriate price Group (I, II, III or IV).

ITEM 18. For each data item, enter an amount equal to that portion of the total price which is estimated to be attributable to the production or development for the Government of that item of data. These estimated data prices shall be developed only from those costs which will be incurred as a direct result of the requirement to supply the data, over and above those costs which would otherwise be incurred in performance of the contract in no data were required. The estimated

GROUP DEFINITIONS

GROUP I. Data which is not otherwise essential to the contractor's performance of the primary contracted effort (production, development, testing, and administration) but which is required by DD Form 1423.

GROUP II. Data which is essential to the performance of the primary contracted effort but the contractor is required to perform additional work to conform to Government requirements with regard to depth of content, format, frequency of submittal, preparation, control, or quality of the data item.

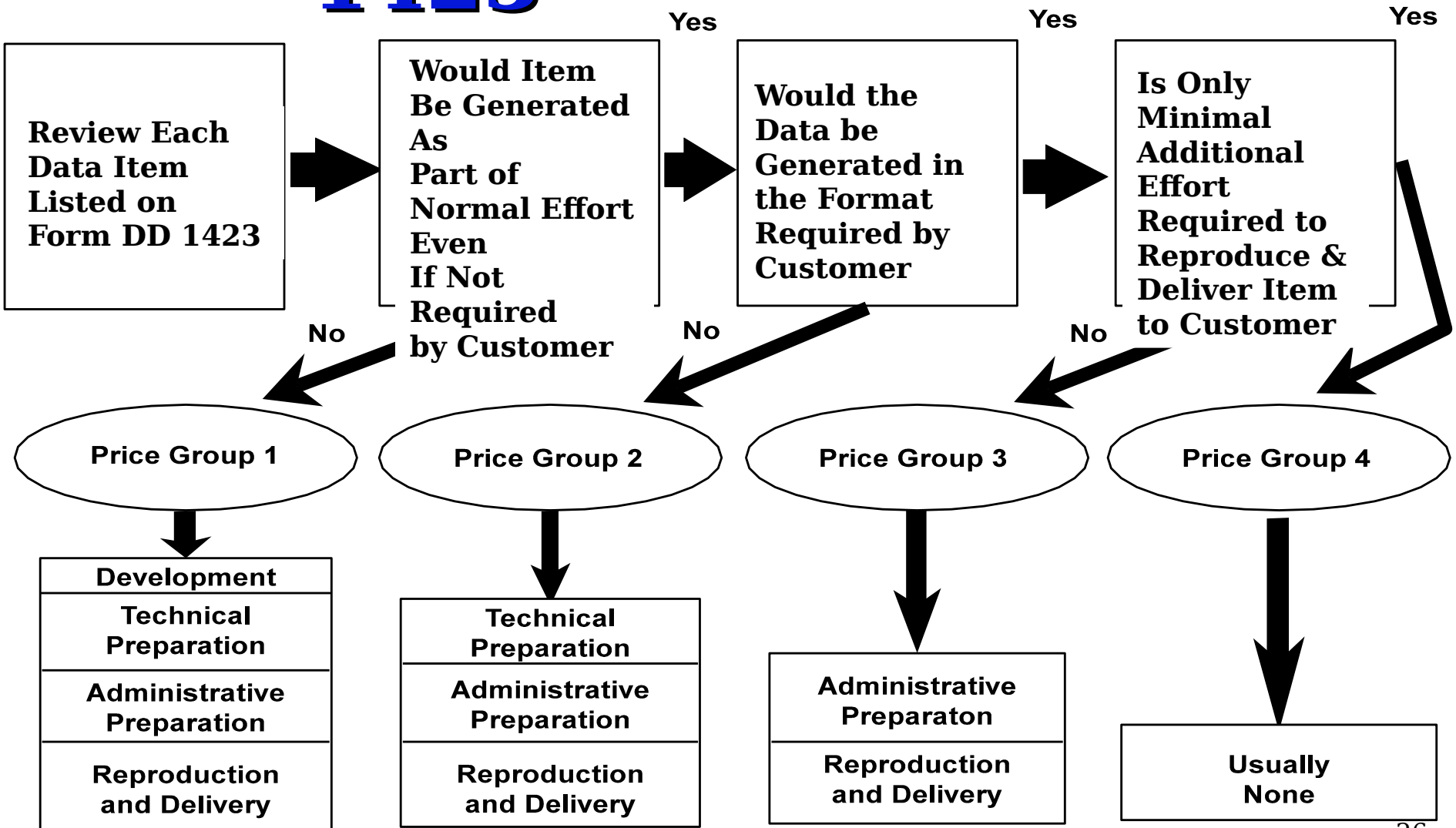
GROUP III. Data which the contractor must develop for his internal use in performance of the primary contracted effort and does not require any substantial change to conform to Government requirements with regard to depth of content, format, frequency of submittal, preparation, control and quality of the data item.

INGREDIENTS of Data Cost

Format

- **Information generation**
- **Reduction to record form**
- **Collation of information**
- **Composition of content**
- **Clerical/Drawing support**
- **Review and**

PRICING OF DATA ITEMS ON DD FORM 1423



PRICING GROUP I

Costs to be included under Group I are those applicable to preparing and assembling the data item in conformance with Government requirements, and the administration and other expenses related to reproducing and delivering such data items to the Government.

Examples of Data:	Cost Factors Included:
Technical Manuals	All preparation costs
Mil Spec Format	Artwork
Provisioning Data	Formatting
Pert Networks	Typing
	Editing

PRICING GROUP II

Costs to be included under Group II are those incurred over and above the cost of the essential data item without conforming to Government requirements; and the administrative and other expenses related to reproducing and delivering such data item to the Government.

Examples of Data:

- Product Drawings
- Test Plans & Reports Government Format
- Calibration Data & Procedures
- Integrated Circuit Reports

Cost Factors Included:

- A portion of the preparation cost
- Formatting
- Artwork
- Typing
- Editing
- Reproduction

PRICING GROUP III

Costs to be included under Group III are the administrative and other expenses related to reproducing and delivering such data item to the Government.

Examples of Data:

- **Technical Manuals Contractor Format**
- **Excessive Numbers of Copies**
- **Test Plans & Reports Contractor Format**
- **Commercial Drawings**
- **Other Selected Data**

Cost Factors Included:

- **Typing**
- **Reproduction**

PRICING GROUP IV

Group IV items should normally be shown on the DD Form 1423 at no cost.

<u>Examples of Data</u>:

Catalogs Sheets

Commercial Brochures

Anything Else Normally

Given Free (But does not include "handout" copies of Pricing Groups

<u>Cost Factors Included</u>:

Minimal or None